Community Indicators and Performance Measures : Is the Twain Meeting?

Public Performance Measurement and Reporting Conference – March 18, 2010 Session @ 11 a.m.-12:15 p.m.

Cheryle Broom, King County Auditor and CIC Indicators/Measures Co-Project Director

Indicators (CI) and Measures (PM) Presentation: Overview

- **What are CI vs. PM?**
- **Why integrate them?**
- **What are the goals of the CIC project?**
- **How is CIC achieving the goals?**
 - **Research, Education & Sharing**

Definitions
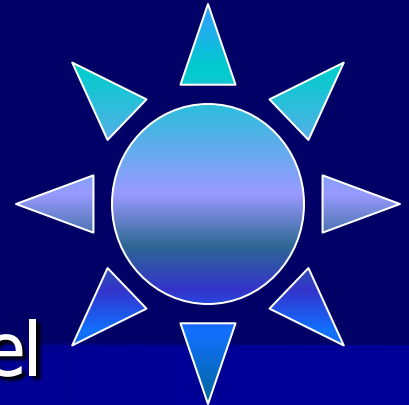
- **Community Indicators**: High-level measures that track community conditions (social, economic, and environmental) and desired community outcomes.

- **Performance Measures**: Quantifiable, enduring measurements of the amount, quality, efficiency, effectiveness, or outcomes of products or services produced by programs/agencies.

Why Integrate Community Indicators (CI) and Performance Measures (PM)?

- Provide evidence of program service performance improvements related to citizens' priorities, as reflected by the indicators

- Increase citizens' confidence in their government's progress toward goals reflected by the indicators and measures

- Enhance the use of data by citizens and public officials for public debate, decision-making, and allocation of scarce resources

- Increase the clarity of the contributions made, or needing to be made, by various sectors of society to improve community conditions

Community Indicators Consortium's CI-PM Integration Project

- Purpose: Identify and promote the benefits, opportunities, and successful practices; increase understanding & usage of CI-PM integration
- Sponsored by Alfred P. Sloan Foundation
- Approaches
  - Expert Work Group
  - Conference Panels
  - Research Papers
  - Case Studies/Real Stories
  - Training & Education
 - Networking & Knowledge Sharing
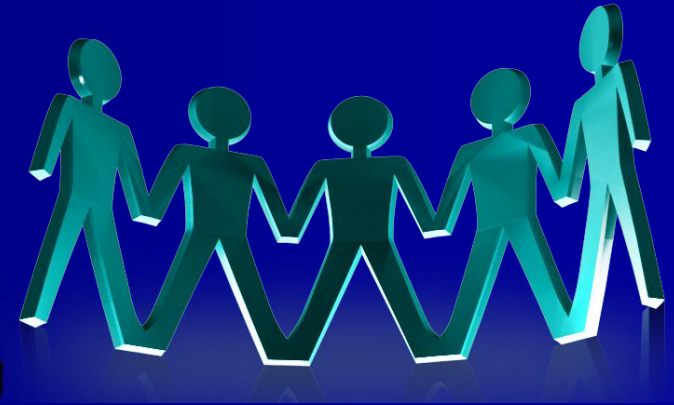
CI-PM Working Group

- American Planning Association
- Association of Government Accountants
- Center for Accountability and Performance/American Society for Public Administration
- Center for Performance Measurement/ICMA
- Community Assessment Project of Santa Cruz County
- Florida Benchmarking Consortium
- Governmental Accounting Standards Board
- Institute for Urban Policy Research at University of Texas at Dallas and the Dallas Indicators Project
- Jacksonville Community Council Inc.
- King County Auditor's Office
- National Association of State Budget Officers
- National Association of Counties
- National Association of County & City Health Officials
- National Association of Planning Councils
- National League of Cities
- National Neighborhood Indicators Partnership
- Portland Multnomah Progress Board
- Public Performance Measurement Reporting Network
- State of the USA, Inc
- The Brookings Institution
- The H. John Heinz Center for Science, Economics, and the Environment
- Truckee Meadows Tomorrow
- Urban Institute

Activities of the CI-PM Working Group

- Developing a **maturity model** (i.e., descriptive model) of CI-PM integration
- Providing **Real Stories** of CI-PM
- Implementing a CI-PM Integration **Awards Program**
- Creating an **education program** for public officials about the value & uses of integrated CI & PM
- Developing an **on-line database** of CI-PM integration efforts
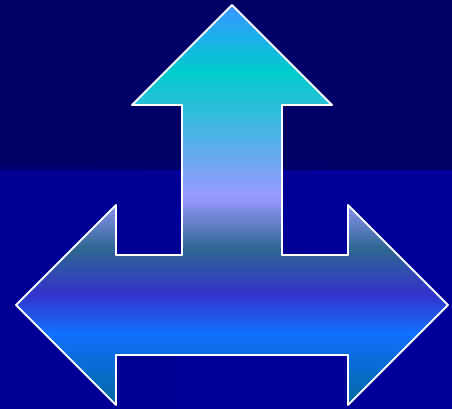
CI-PM Maturity Model

- Four Stages addressing: What, Why When, Where and Who
  - Stage I Separate CI & PM Programs
  - Stage II Some connectivity
  - Stage III More linkage
  - Stage IV "Mature" integration with measurable results linked, community-driven and transparent (real time)

CI-PM Maturity Model

	Separate CI & PM projects	Stage 2	Stage 3	Mature integration CI-PM
What	**Community Indicators (CI)**			Citizen-driven CI's determine PM impacts linked to quantifiable & measurable results: community needs, sustainability, resource allocation, data-driven policy decisions, & next steps for decision options and priorities
	Metrics quantifying values, community, conditions, outcomes & results important to wide-ranging residents within a community	Visioning process involving citizens, key stakeholders, and governmental and nongovernmental entities	Metrics focus on community and programmatic outcomes involving decision- and policy-makers through consensus-building	
	Performance Measures (PM)			
	Metrics documenting the outputs of services provided by a government or nongovernmental entity	Linkages between strategic and annual performance planning with metrics documenting the outputs and outcomes of services provided by a government or nongovernmental entity	Citizens and other key community stakeholders participate in the development of output and outcome metrics through forums, feedback systems, or advisory bodies	

CI-PM Maturity Model

Why	Separate CI & PM projects	Stage 2	Stage 3	Mature integration CI-PM
	Community Indicators (CI)			
	Knowledge-producing story of where a community is today, in relation to where it's come from	Evidence of citizen priorities as reflected by indictors through credible and reliable data that stimulate public dialogue and debate	Evaluation and public debate determine the whys of community conditions, strategies developed and implemented, and resources identified and committed to improve community conditions	Transparent results-based governance & decision-making consistent with citizen priorities for positive community change, community capacity building, economic development & land use, sustainability, reporting for citizen accountability & civic trust
	Performance Measures (PM)			
	Knowledge-producing managerial performance system to achieve efficiencies and improve costs in relation to programs and departments/ divisions/ agencies	Improved data and performance-based budgeting and resource allocation through credible and reliable data. More effective service delivery ROI to citizens in allocating limited resources at all levels demonstrated	Outcomes of programs and services demonstrated that reflect citizens and other key stakeholders' priorities	

CI-PM Maturity Model

When	Separate CI & PM projects	Stage 2	Stage 3	Mature integration CI-PM
	Community Indicators (CI)			
	Historical measures and trends over time alerting the need for improvement	Leading and lagging indicators benchmarked for measurable improvement or decline	Long-term and annual goals and targets established periodically and progress measured and publicly reported	Evidence on demand – knowing where residents get their information, what their priorities are & what info they want to know about – within defined time periods, used for regular tracking & strategic decision-making
	Performance Measures (PM)			
	Annual performance measures	Annual measures progress linked to annual budget development and decisions	Strategic and annual performance goals influence budget discussions and decisions. Community indicators influence the strategic and annual performance goals. Strategic and annual performance goals' progress publicly reported	

CI-PM Maturity Model

Where	Separate CI & PM projects	Stage 2	Stage 3	Mature integration CI-PM
Community Indicators (CI)				
	Defined community area	Defined community area and demographic groups	Defined community area, demographic groups, neighborhoods and street-level data or larger state and neighboring/regional areas crossing political boundaries. Compared to other defined areas, as appropriate	Localized neighborhoods to any defined group within a geographic area, regardless of political boundaries
Performance Measures (PM)				
	Local government departments/divisions within a defined geopolitical boundary	Contributions of programs and services to changes in community conditions identified along with those of other public agencies, nongovernmental entities, and businesses	Regional and intergovernmental collaboration and comparisons	

CI-PM Maturity Model

	Separate CI & PM projects	Stage 2	Stage 3	Mature integration CI-PM
Who	**Community Indicators (CI)**			
	Community residents likely to control or influence community conditions	Key community stakeholders from all sectors (diverse institutional and business leaders, civic and community groups, local government, policy- and decision-makers) likely to control or influence community conditions	Coalitions, networks, compacts and other community organizing efforts form to lead community change	Committed accountability for improvements & collaborative advocacy, inputs & use (diverse government, public/citizen, nonprofit & business engagement & participation at all stages) as leadership changes over time
	Performance Measures (PM)			
	Government entity management	Policy-makers and elected officials	Networks of community stakeholders including government and non-government entities, legislative bodies, regional partners, and coalitions	

Information Gained from "Real Stories" and CI-PM Integration Awards

- Albuquerque, New Mexico
  - Strategic Management System
    - Community Indicators
    - Performance Plans
    - Employee Work Plans
  - Citizen driven process for developing community indicators
    - identifies broad community goals and desired community conditions (DCCs)
  - Effort led by the Indicators Progress Commission
  - City government departments align their programs to the community goals and DCCs through program strategies—action oriented groupings of resources and activities

Information Gained from "Real Stories" and CI-PM Integration Awards

- Children's Services Council (CSC) Broward County, FL
  - CSC—created as part of an Independent Special Tax District
  - Project called, "Making Children's Lives Better"
- Key Tools
  - Broward County Children's Strategic Plan that contains indicators focusing on the conditions of children's lives
  - CSC internal goals and objectives have performance measures for all funded programs that are derived from indicators in Strategic Plan
  - Annual Children's Budget Forums
  - Funders Forum

Information Gained from "Real Stories" and CI-PM Integration Awards

- Government of South Australia
- Key Tools
  - Strategic Plan that contains community indicators; over 1,600 community members involved in creating the 2007 plan
  - Executive Committee of the Cabinet
  - Community Engagement Board
  - Independent Audit Committee
  - Government agencies serve as "leads" for individual community indicators
  - Key Performance Indicators (measures) for each agency that are integrated with the community indicators

Information Gained from "Real Stories" and CI-PM Integration Awards

- Virginia Performs
  - State level project
- Key Tools
  - Establishment of the Council on Virginia's Future
  - Council working with groups of public and private sector officials established the vision and long-term goals and related societal indicators
  - State government agencies performance measures connected to the indicators
  - Virginia Performs Web site—houses and displays all levels of agencies' strategic plans and performance measures, provides a mapping application for viewing and comparing regional and local data
  - "Guide to Virginia Performs" provided to all members of the General Assembly
  - "The Virginia Report" submitted to General Assembly: an annual assessment of Virginia's progress on societal indicators and state agencies' performance on key measures aligned with indicators

Information Gained from "Real Stories" and CI-PM Integration Awards

- **Truckee Meadows Tomorrow (TMT) - grassroots nonprofit**
  - Citizen-driven CIs measuring quality of life 👍 or 👎 since 1993
  - Actionable TMT programs for community improvement

- **And Washoe County, Nevada**
  - Board of County Commissioners sets strategic priorities using TMT monitored CIs
  - Departments use CIs to identify outcomes in measurable, auditable terms
  - Management uses CIs in setting annual objectives & PMs
  - Budgets developed to meet annual performance targets
  - Mgt monitors PMs, adjusts resources & report performance
  - TMT uses county PMs in tracking CI measures over time

- **CIs are tools for county planning, budgeting & decision-making to improve service delivery in measurable ways responsive to citizen priorities**

Creating an education program for officials about the values & uses of integrated CI and PM

- Brochure – Overview (on Web shortly)

- Webinars - The experiences of leaders (beginning in April)

- Focused technical assistance – Speakers Bureau (template)
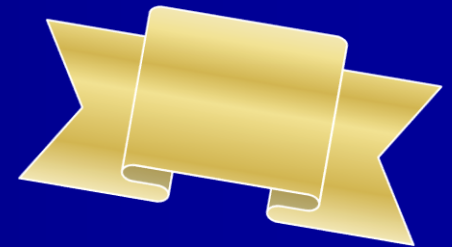
Developing an on-line database of CI-PM integration efforts

- A searchable database on community indicator and CI-PM integration projects
- Phase I
  - To be released in late April 2010
  - Will capture broad information on indicator and CI-PM integration efforts
- Phase II
  - To be released by the fall of 2010
  - Expand the database to capture specific information on the types/categories of community indicators and performance measures and to show which specific CI and PM are integrated

So What❓

- How are CI and PM used separately or jointly for policy-making?

- Will "integration" really make a difference?

- Where does your community fit in the CIC's "Maturity Model"?

- How can I be part of the CI-PM integration network?

Resources - Contacts

CIC Web site: www.communityindicators.net/

Albuquerque Progress Report: www.cabq.gov/progress/
Albuquerque Performance Plan: www.cabq.gov/budget
Children's Scvs. Council of Broward Co.: http://www2.cscbroward.org/
South Australia's Strategic Plan: www.saplan.org.au/
Virginia Performs: http://vaperforms.virginia.gov
TMT: www.truckeemeadowstomorrow.org
Washoe County: www.washoecounty.us

Aclomax@aol.com
Cheryle.Broom@KingCounty.gov
Countywide Performance Management, King County Auditor's Office
www.kingcounty.gov/operations/auditor/performance_measurement.aspx

"Bridging the divide between community indicators and government performance measurement can increase the relevance and impact of both. This can be done by linking community indicators to government activities and basing some government performance measures on input from citizens."

Dr. Ted Greenwood, Alfred P. Sloan Foundation

Why?

- Indicator/measurement system is meant to improve: public discussion, management decision-making, transparency & accountability
- Shows the condition of the community
- Provides potential areas for further interventions
- Shows government's contribution
- Shows the two-way interaction between community conditions and agency performance
  - For example: "Economy" & "Business Development"
  - Indicators alone often aren't actionable & measures alone don't provide enough context